

# CHEDBURGH PARISH COUNCIL

Clerk: Abbie Lee | Email: clerk@chedburgh-pc.gov.uk

---

## Retention of Documents and Records Management Policy

*Adopted on 1<sup>st</sup> DECEMBER 2025*

*Reviewed: Every three years*

Chedburgh Parish Council recognises that the efficient management of its records is necessary to comply with its legal and regulatory obligations and to contribute to the effective overall management of the Council. This document provides the policy framework for through which this effective management can be achieved and audited. It covers:

- Scope
- Responsibilities
- Relationships with existing policies
- Retention schedule

### Scope of the policy

This policy applies to all records created received or maintained by the Council in the course of carrying out its function. Records are defined as all those documents which facilitate the business carried out by the Council and which are thereafter retained (for a set period) to provide evidence of its transactions or activities. These records may be created, received or maintained in hard or electronic copy.

A small percentage of the Parish Council's records will be selected for permanent preservation as part of the Council's archives and for historical research.

### Responsibilities

The Council has a responsibility to maintain its records and record management systems in accordance with the regulatory environment. The person with overall responsibility for this policy is the Clerk.

### Relationship with existing policies

This policy has been drawn up within the context of

- Freedom of Information Policy
- Data Protection Policy
- And with other legislation or regulations (including audit and Stature of Limitations) affecting the Council.

### Retention Schedule

Under the Freedom of Information Act 2000, the Council is required to maintain a retention schedule listing the record series which it creates in the course of its business. The retention schedule lays down the length of time which the record needs to be retained and the action which should be taken when it is of no further administrative use.

The retention schedule refers to record series regardless of the media in which they are stored.

## RETENTION OF DOCUMENTS REQUIRED FOR THE AUDIT OF THE COUNCIL

Document	Min Retention Period	Reason
<b>Minutes and Correspondence</b>		
Signed minutes of Council Meetings	Indefinite	Archive
Agendas of Council Meetings	Indefinite	Archive
Correspondence & papers on important local issues and activities	Indefinite	Archive
Routine correspondence, papers and emails	Retain as long as useful	Management
<b>Finance and Payroll</b>		
Scale of fees and charges	Six years	Management
Receipt and Payment Accounts	Indefinite	Archive
Accounts/Financial Annual Return	Indefinite	Archive
Receipt books	Six years	VAT
Bank Statements	Last completed audit year	Audit
Bank Paying-in books	Last complete audit year	Audit
Cheque Book Stubs	Last complete audit year	Audit
Quotations and Tenders	Six Years	Limitation Act 1980
Contracts with suppliers for services	Six years from end of contract	Legal and Audit
Paid invoices	Six years	VAT
Paid cheques	Six years	
VAT records	Six years	VAT
Payroll records	12 years	Legal requirement
Insurance Policies	As long as a claim can be made under it	Management and Legal Proceedings
Certificates for Insurance against liability for employees	Indefinite	Future Claims
Investments	Indefinite	Audit and Management
Title deeds, leases, agreements, contracts	Indefinite	Audit and Management
Members Allowances Register	Six years	Tax and Limitation Act 1980 (as amended)
<b>Allotments:</b>		
Register and plans:	Indefinite	Audit and management
<b>Planning:</b>		
Applications: All consultative documents including plans	Not retained	Held by Local Planning Authority
Applications upon which the Council has commented	12 months	Management

**Note: There are no firm guidelines for the retention of general correspondence.**